

Produced in Native

Discover Spotlight on GenZ Users

UXR Insights and Planned Initiatives

Date • Names

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Discover research with younger users

1
2 The Pew Research Forum defines "Generation Z" as those born 1997 and 2012. As of the date of this deck (February 2021), **Generation Z span in age from 9 to 24.**

The data presented in this deck will refer to specific age groups rather than GenZ more broadly.

- Most commonly research has been conducted with participants aged 18-24. This represents approximately seven percent of our current discover users. When evaluating Channels, all studies included this age group in their analysis.
- Data is also presented from several studies with younger participants aged 13-18. This age group has become a stronger focus of the team. The most recent [Channels Diary \(2.1\)](#) study included this age group. [New efforts are focusing on this group more explicitly.](#)
- Please note that research with younger members of Generation Z is not included here.

Slide 1

- 1 [REDACTED]@google.com Calling out your efforts here. Thank you for leading our thinking here and including this younger cohort in your work!
Olga [REDACTED] 2/9/2021 8:42:32 PM
- 2 [REDACTED]@google.com Is this right?
Olga [REDACTED] /9/2021 8:38:56 PM

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Content Consumption Preferences [Discover Agnostic]

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Data sources

Data in this section are from two sources.

1. Internal [“Topics of Interest for Mobile Browsing”](#) survey: A multi-market survey of 7,674 individuals (52% GenZ and 38% Millennial) suggests that each age cohort has unique interests when browsing content on their mobile device.

2. External market data analyses (details noted in subsequent slides)

Demographic data for internal survey:

Age



Respondents per Country



1,540 U.S.
1,548 Brazil
1,510 Germany
1,538 India
1,538 Indonesia

Top ten interests among different age cohorts

There was substantial overlap in the types of content and topics participants reported as interesting. A few unique topics emerged for the younger groups.

Compared to Millennials (ages 24-34), GenZ (ages 13-24) reported gravitating towards content that is **Funny** or focused on **Food & Drink**.

Younger GenZ (ages 13-18) also reported interest in memes, GIFs, & Webcomics as well as Video Games.

Ages 13-18

1. Music
2. Movies
3. Funny
4. Memes, GIFs & Webcomics
5. Technology
6. Fun facts
7. Creative
8. Video Games
9. Inspiring
10. Food & Drink

Ages 19-24

1. Music
2. Technology
3. Movies
4. Funny
5. Inspiring
6. Fun facts
7. Creative
8. Nature & Environment
9. Food & Drink
10. Health & Wellness

Ages 25-34

1. Music
2. Technology
3. Movies
4. Nature & Environment
5. Inspiring
6. Health & Wellness
7. Education
8. Jobs & Careers
9. Creative
10. Fun Facts

Topics highlighted in red are unique to that group's top 10 interests (not found in other 2 groups)
Topics highlighted in orange are unique to the two younger groups' top 10 interests (not found in older group)

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Source: [Topics of Interest for Mobile Browsing](#), n=7,674 Survey U.S., Brazil, Germany, India, Indonesia, March 2020

Source Preferences by Age – U.S.

Younger cohorts of respondents were more inclined to use social media for browsing. Facebook was the only social media platform that appealed more to Millennials than Gen Z respondents.

	Gen Z		Millennials
	Ages 13-18 n=571	Ages 19-24 n=381	Ages 25-34 n=588
YouTube	87% ▲	82%	77%
Google	73%	76%	80%
Instagram	80% ▲	72%	59%
Facebook	41%	59%	76% ▲
Snapchat	67% ▲	58%	36%
Chrome	44%	52%	51%
Safari	45%	43%	28%
Twitter	35%	45% ▲	31%
TikTok	52% ▲	30%	15%
Reddit	18%	26% ▲	21%

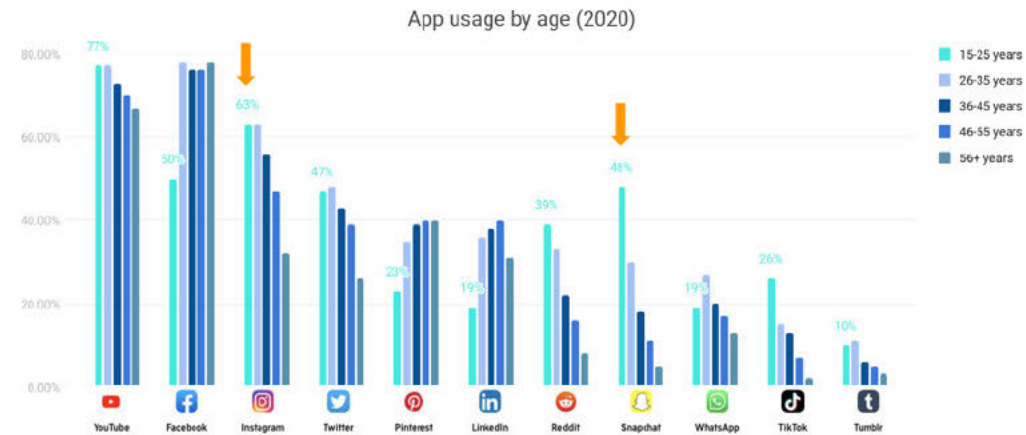
▲ indicates significantly higher scores than two age groups at a 95% confidence.

Q: Which of the following source(s) do you prefer to use when browsing content on your mobile phone? Select all that apply. (n=1,540)

Q: Which of these sources do you prefer to use when browsing content on your mobile device? Select all that apply. (n=1,489)

Source: [Topics of Interest for Mobile Browsing](#), n=7,674 Survey U.S., Brazil, Germany, India, Indonesia, March 2020

Younger users (ages 15-25) use Snapchat (48%) and TikTok (26%) far more than other age groups



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G 8

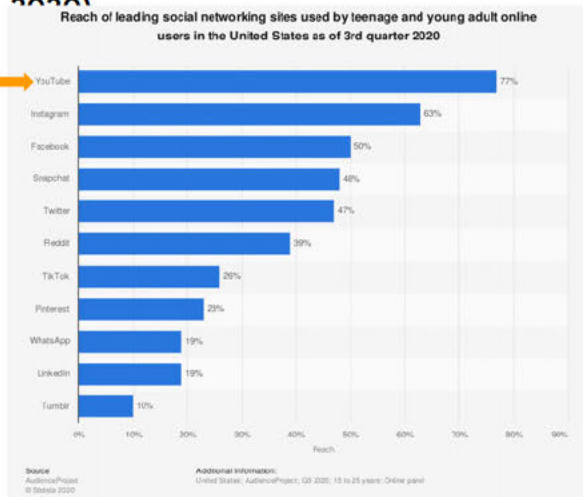
Gen Z uses Facebook (50%) and Pinterest (23%) far less than other generations

Source: <https://www.audienceproject.com/blog/key-insights/new-study-instagram-climbs-the-ladder-tiktok-has-a-long-way-to-go/>

Full report:

https://drive.google.com/file/d/1C8V7pvk_7qYr5C8qHE8i8kXvHga2JeDE/view?usp=sharing&resourcekey=0-7BACJeULYbh-lvmsRP03aQ

Youtube is the most popular social media site used by 15-25 year olds (Q3 2020)



This statistic gives information on the most popular [social media sites](#) used by teenage and young adult internet users in the United States as of the third quarter of 2020. During the survey period, it was found that 63 percent of responding internet users aged 15 to 25 years used social photo sharing app Instagram. Despite Snapchat's dominance, Facebook continues to be the more widely used social networking site used by teenagers and young adults. A total of 50 percent of respondents currently use Facebook, compared to 48 percent of respondents who stated that they used Snapchat. Yet when teens, whose average age was 16, rated their [most important social network](#), Snapchat, Instagram, and Twitter were given more important ratings than Facebook. These social networks are being increasingly visited via mobile devices.

Link: <https://www.statista.com/statistics/199242/social-media-and-networking-sites-used-by-us-teenagers/>

Instagram is the most important app to Americans ages 15-25 (Q3 2020)

Apps Americans least can do without on their mobile:

15-25

1		Instagram	27%
2		YouTube	17%
3		Snapchat	15%
4		Twitter	13%
5		Facebook	12%

26-35

1		Instagram	19%
2		Facebook	16%
3		YouTube	12%
4		Twitter	10%
5		Gmail	10%

Note:

The figures represent how many that name the following apps as one of the three apps they least can do without

36-45

1		Facebook	22%
2		Instagram	11%
3		Gmail	10%
4		Amazon	7%
5		Twitter	7%

46-55

1		Facebook	17%
2		Gmail	11%
3		Google Maps	8%
4		Instagram	8%
5		Amazon	8%

56+

1		Facebook	17%
2		Google Maps	8%
3		Gmail	7%
4		Amazon	4%
5		Google	5%

Source: <https://www.audienceproject.com/blog/key-insights/new-study-instagram-climbs-the-ladder-tiktok-has-a-long-way-to-go/>

Full report:

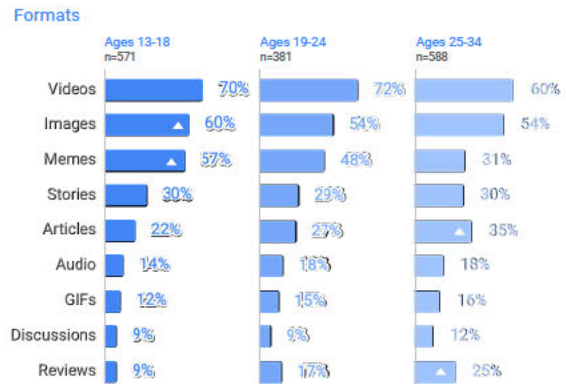
https://drive.google.com/file/d/1C8V7pvk_7qYr5C8qHE8i8kXvHga2JeDE/view?usp=sharing&resourcekey=0-7BACJeULYbh-lvmsRP03aQ

Methodology: The study is a part of AudienceProject Insights 2020. Data is collected through online surveys done in Q3 2020. The respondents have been selected from our Nordic, German, UK and US panels consisting of more than 1.5 million panelists and weighted to achieve representativity on the more than 16.000 respondents who completed the survey.

Format Preferences by Age – U.S.

All age groups expressed preference for video over other content and an additional draw toward images. The preference for images was strongest in the younger participants. This youngest group was also uniquely drawn to memes.

The older group of participants (ages 25-34) showed a preference for articles and reviews that was stronger than the other two age groups.



▲ indicates significantly higher scores than two age groups at a 95% confidence.
Q: Which of the following format(s) do you prefer to see when browsing content on your mobile phone? Select up to 3. (n=1,540)

Source: [Topics of Interest for Mobile Browsing](#), n=7,674 Survey U.S., Brazil, Germany, India, Indonesia, March 2020

Tone Preferences by Age – U.S.

All age groups preferred light-hearted content (entertaining, funny).

The preference for entertainment was lower for millennials compared to the other two groups.

The youngest participant (ages 13-18) showed a stronger preference for "cute" content than the other two groups.

Tones

	Gen Z		Millennials
	Ages 13-18 n=571	Ages 19-24 n=381	Ages 25-34 n=588
Funny	64%	50%	43%
Entertaining	54%	54%	44% ▼
Informative	25%	30%	37%
Useful	25%	26%	30%
Educational	20%	23%	30%
Inspiring	18%	18%	19% ▲
Cute	16% ▲	12%	8%
Relaxing	13%	19%	15%
Uplifting	13%	12%	14%
Heartwarming	12%	7%	12%
Beautiful	11%	8%	7%
Shareable	10%	10%	10%
Supportive	6%	8%	10%
Joyful	5%	11%	12%
Novel	2%	3%	3%

▲ indicates significantly higher scores than two age groups at a 95% confidence.
Q: Are you interested in content that is...? Select up to 3. (n=1,440)

Source: [Topics of Interest for Mobile Browsing](#), n=7,674 Survey U.S., Brazil, Germany, India, Indonesia, March 2020

Current Discover GenZ Users

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Slide 1

1

I recommend also including the differences we found in the channels
UXR train

Simon [REDACTED] 2/11/2021 2:38:33 AM

Order GenZ Users (ages 18-24) make up the lowest proportion of Discover users compared to the other age brackets

Show 100 entries

Search:

Dimension	Slice	% of traffic	Interactive Users
User Age Bracket	AGE_UNKNOWN	38.29	80,926,297
User Age Bracket	AGE_45_TO_54	14.95	31,592,645
User Age Bracket	AGE_55_TO_64	14.49	30,628,212
User Age Bracket	AGE_35_TO_44	13.96	29,509,782
User Age Bracket	AGE_25_TO_34	10.64	22,480,415
User Age Bracket	AGE_65_PLUS	10.48	22,154,190
User Age Bracket	AGE_18_TO_24	5.43	11,475,639

Showing 1 to 7 of 7 entries

Source: data collected from October 12-18, 2020

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These are screenshots with US numbers only, for dates Oct 12 - 18, 2020.

An **interactive user** is someone with any combination of:

- explicit interaction (such as a click)
- or a scroll
- or a long view (at least 2 seconds)

The cards viewed metric is a count of views, so it's not a user count at all, but I think it's a good example of the difference between engagement across user ages. E.g. Age 65 makes up 10.48% of DAU and 12.24% of views, indicating that they have more engagement than some other age groups.

Slide 1

- 3 [REDACTED]@google.com Where did you pull these from?
[REDACTED]@google.com [REDACTED]@google.com
[REDACTED]@google.com Does this look like the analysis you would encourage us to use?
Olga [REDACTED] 2/23/2021 3:02:51 AM
- 1 Hi Upa, can you please sync with Olga on this? This looks to me like DSGS data. Please share a link to the underlying data source.
Ioana [REDACTED] 2/9/2021 10:25:28 PM
- 1 I reached out to [REDACTED]@google.com in October, [REDACTED]@google.com provided screenshots for me. I also have details in the speaker notes.
Emilie [REDACTED] 2/9/2021 10:27:55 PM
- 2 (Note: it's also worth calling out that a sizable chunk of traffic is "age unknown"). Of course feel free to remove these two slides.
Emilie [REDACTED] 2/9/2021 10:38:54 PM
- 4 Thanks Ioana.
- Thanks Emilie - It might be that we can only infer age from signed in users.
Olga [REDACTED] 2/9/2021 10:41:00 PM
- 2 That's correct, age is only available for signed-in users.
Ioana [REDACTED] 2/9/2021 11:05:27 PM
- 1 Confirming, I used DSGS to pull these numbers
Amanda [REDACTED] 2/9/2021 11:10:52 PM
- 1 Is this counts by gaia or dau? also what is the time period?
Upasana [REDACTED] 2/10/2021 12:23:32 AM
- 5 Upasana, there are a few notes in the speaker notes, but this is one of those slides that got passed around and came to us from [REDACTED] murdoch
Olga [REDACTED] 2/10/2021 12:45:50 AM
- 2 Thanks [REDACTED]@google.com .
Our recent analysis found some issues with the way age is logged in discover table (DSGS). Getting the age distribution from magic eye tells a different story <https://screenshot.googleplex.com/58qigM2VaDZKuSN>
Upasana [REDACTED] 2/10/2021 8:59:34 PM
- 3 Super interesting. What is the date range used in that screenshot?
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- 3 20201212 to 20210108....the corresponding DSGS roboslicer view is <https://screenshot.googleplex.com/7iAxBWhSC77tgMG> . When filtered to US only: <https://screenshot.googleplex.com/5CxxN45FyytSJK5> (to be noted that the screenshot I shared in the previous comment is without

Slide 1 (continue)

filtering for US)

Upasana [REDACTED] 2/10/2021 11:43:06 PM

- 4 [REDACTED]@google.com could you send me another screenshot with just the US numbers from magic eye?

Would you say that magic eye is a better way to report Gen Z usage?

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- 4 Here's the screenshot with US only: <https://screenshot.googleplex.com/439HjVXguJAgCN5>

Yes I do think we should use the magic eye data.

[REDACTED]@google.com [REDACTED]@google.com WDYT?

Upasana [REDACTED] 2/19/2021 10:04:12 PM

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- 5 Is the correct way to interpret the magic eye graph to say:

"Between 12/12/2020 and 1/8/2021, 21.19% of Discover DAUs were aged 18-24 and 22.27% of logged in Discover DAUs were 18-24"

One other question - does the red bar include logged in (gaia) + logged out (zwieback) users?

Emilie [REDACTED] 2/23/2021 1:05:14 AM

- 5 We only have demographic data for GAIsAs, not for zwiebacks. The blue bars are unique gaia counts while the red bars are user-days (i.e. if a gaia visits on two days within the given time period it will contribute 2 counts to the red bar but only one to the blue bar). We can make some inferences about engagement from this- example: 22% gaia's who are youth (18-24) contribute to 21% daus, while 14% gaia's who are 55-64 contribute to ~16%daus...this implies the gaia's in 55-64 come back to Discover more than the gaia's in the youth bucket.

Upasana [REDACTED] 2/23/2021 3:02:51 AM

- 2 I recommend using MAU for this slide.

Simon [REDACTED] 2/11/2021 2:36:37 AM

10

Older GenZ Users (ages 18-24) have the lowest engagement on Discover

Show 100 entries

Search:

Dimension	Slice	% of traffic	1A. Organic Collection Boolean Views
User Age Bracket	AGE_UNKNOWN	24.33	1,965,893,392
User Age Bracket	AGE_55_TO_64	16.44	1,326,404,217
User Age Bracket	AGE_45_TO_54	16.23	1,311,268,545
User Age Bracket	AGE_35_TO_44	15.56	1,257,145,414
User Age Bracket	AGE_65_PLUS	12.24	989,450,235
User Age Bracket	AGE_25_TO_34	10.96	885,719,023
User Age Bracket	AGE_18_TO_24	4.24	342,648,153

Showing 1 to 7 of 7 entries

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1

Next

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G 15

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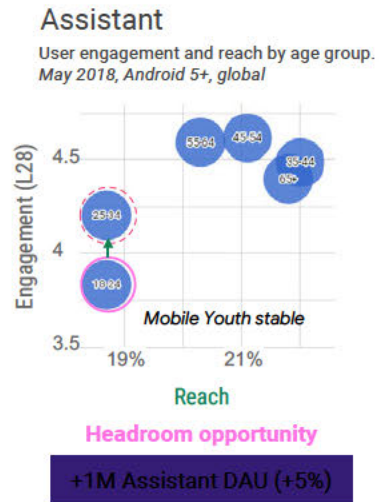
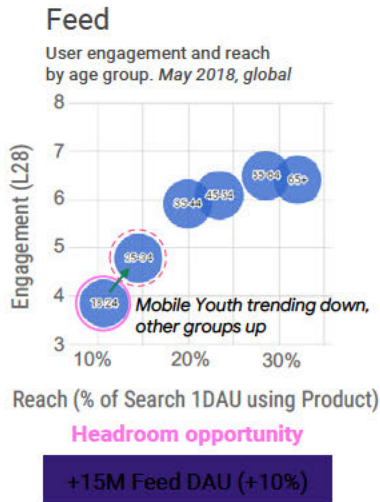
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Mobile Youth are less engaged with Feed and Assistant



YoY trends

https://dasnav.corp.google.com/v/multiday/#label_id=lzj3e&p=l.lni3e&p=l.lzj3e&view=default

11

Youth's impression of the feed was a "news" app, not an interests app

For existing and new users alike, their description of the feed was that it contained articles about the news.

Many also felt there was a particular emphasis on political news, which few cared about.

HMW feature **current events** that are more interesting to youth (e.g. teen movements)?



Yes I've been to Google Feed. There is news, India Times, different news... this is also news. This is news only, particular news, only one is an interesting article. I don't have much interest in politics. This is all political news. It's not interesting.

- Harsh, 16, IN



Slide 1

- 9 [REDACTED]@google.com Do you know which part of the study this came from (e.g. interviews, which country? how many pps?). No worries if you can't remember.
Olga [REDACTED] 2/10/2021 5:52:40 AM
- 1 not my report btw but looks like the breakdown is on this slide: https://docs.google.com/presentation/d/1O6rFKOHm9CiVfztIXTmkKPOpes5_BQu3-S0-dS_XSkI/edit#slide=id.g3a56c609b1_0_375
Sophia [REDACTED] 2/9/2021 11:00:03 PM
- 10 Yeah, I saw that. It's unclear which of those this is from. Was hoping you remembered. [REDACTED]@google.com Do you remember?
Olga [REDACTED] 2/10/2021 2:13:29 AM
- 1 hi olga, this was from the interview part of the mobile youth work, which was 20 ppts across both US and India.
This perception of Discover feeling like a news app has come up in a bunch of other Discover studies as well, from my recollection from a few years' ago. there's also Marketing research on it: https://docs.google.com/presentation/d/1MM1yjb1v-ruHUnsJVsbXpIFnLUEaZ8FiA_SmR35RNB8/edit#slide=id.g7ecd405197_0_1788
Debra [REDACTED] 2/10/2021 5:37:21 AM
- 11 Thank you! Super helpful.
Olga [REDACTED] 2/10/2021 5:52:40 AM

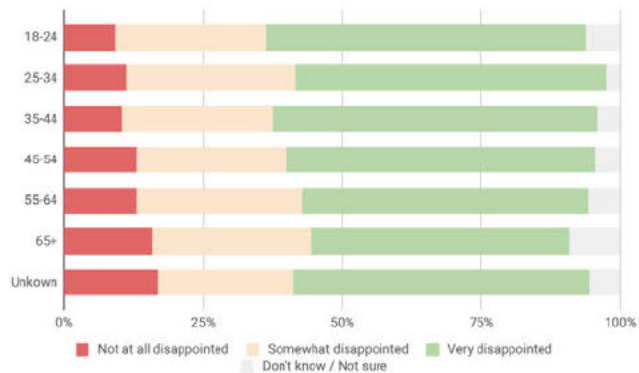
Among iOS users, there is no significant difference in overall satisfaction with Discover by age

Among our existing Discover users in the iOS Google App, there was no significant difference in the overall attitude and satisfaction with the product between younger (ages 18-24) and the rest of the group.

*Note that the "Product-Market Fit" question and methodology is used here as a proxy for satisfaction.

* Note that due to the limitation of HaTS, the answer items here were limited and different from the standard question framing (and different from our use of the same question in other surveys)

How disappointed would you be if you could no longer use the article feed in your app? (n=3,998)



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G 18

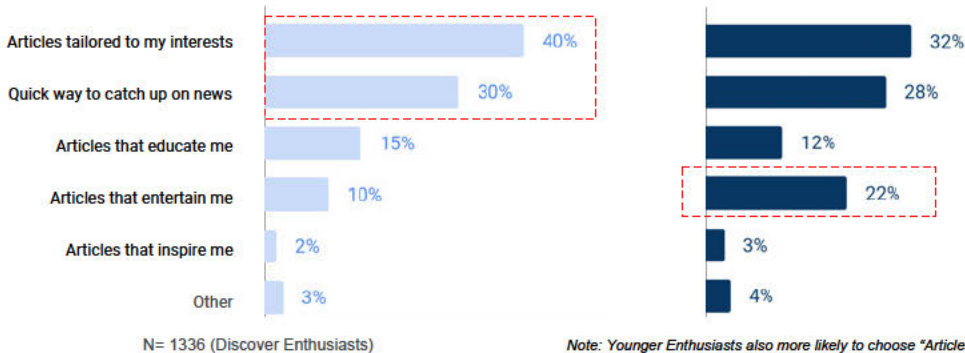
The age x PMF is significant.
For 65+ group is more likely to say not sure

Younger users who find resonance with Discover are more likely to describe articles as “entertaining”

Q: Which of the following best describes the article feed?

Enthusiasts view Discover as personalized and convenient news

And Younger Enthusiasts (18-24 years old, N=301) are twice as likely to say Discover entertains



Note: Younger Enthusiasts also more likely to choose “Articles that inspire me” compared to older Enthusiasts

Slide 1

1

██████████@google.com
Added from the Discover PMF deck
Assigned to ██████████@google.com
Peiyun ██████████ 2/9/2021 11:05:17 PM

Top reasons iOS Discover users are drawn to the product

Answers to open ended text fields were coded among participants who reported that they would be "Extremely Disappointed" if they could no longer use Discover *and* are frequent users of Discover.

Response (coded)	Ages 18-24 (N=100)		All participants	
	%	N	%	N
6i Personalized /curated	11%	21	12%	188
News	34%	34	18%	286
Convenient, quick, and/or easy	18%	18	13%	215
Interesting, enjoyable, entertaining content	13%	13	10%	164
Habit	12%	12	10%	154
Keeps me updated	10%	10	9%	146
Fit my interests	26%	26	5.4%	86
Articles are informative	3%	3	3%	28
I like the UI, format, and/or interface	2%	2	0%	0
The articles are helpful or useful	1%	1	1%	15

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20

Slide 1

11 [REDACTED]@google.com I highlighted the top three responses with the biggest differences between Ages 18-24 and All participants.

Do you know if any of them are statistically different?

Assigned to [REDACTED]@google.com

Emilie [REDACTED]; 10/8/2021 10:22:22 AM

12 [REDACTED]@google.com Double checking that the percent and number are the same here, was this out of 100 users?

Olga [REDACTED]; 2/10/2021 3:22:53 AM

2 Hi, Olga, yes. Because each users may provide more than one reason, so for both Genz and all users, their responses % are not added up to 100%

Peiyun [REDACTED]; 2/9/2021 10:26:18 PM

3 1. These are Frequent Discover users who are GenZ (Not all GenZ)
2. The top one was aggregated from

6% Interests

26% All personalize/interest

23% Topics of interest

21% It's personalized / curated / tailored

Peiyun [REDACTED]; 2/9/2021 10:29:15 PM

13 No, my question was just to double check that there were 100 responses here. See how the first row says 76% and then 76.

Olga [REDACTED]; 2/10/2021 2:34:01 AM

4 Yes, the total number of this group is 100.

Peiyun [REDACTED]; 2/10/2021 3:22:53 AM

14 [REDACTED]@google.com Something weird is happening. 76% of GenZ reported "personalization" is important, but only 11.7% of all participants. I don't think the difference can be this big. I am pulling all participants from

here: https://docs.google.com/presentation/d/16ULivRvYDpDly8nZLTDC9nZjuyCQZENENqkaQtMxv7A/edit#slide=id.g71515d943c_20_0

Olga Antonenko Young; 2/10/2021 5:17:59 PM

15 [REDACTED]@google.com reping for the morning

Olga Antonenko Young; 2/10/2021 2:32:51 AM

5 Sorry just saw this. Working on this now.

Peiyun Zhou; 2/10/2021 4:43:03 PM

6 Updated!

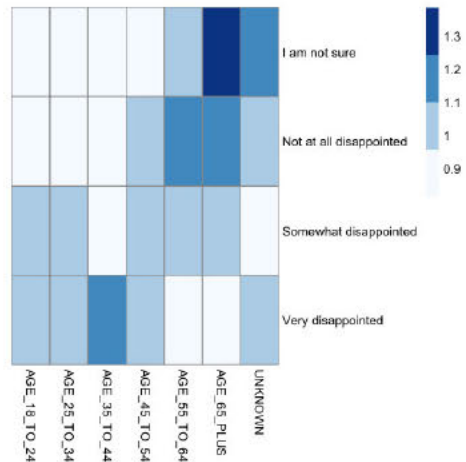
Peiyun Zhou; 2/10/2021 5:17:59 PM

Peiyun drop in slides after
here

Product Market Fit (PMF) is significantly associated with age

For all survey users:

- Users who are 65+ years old were more likely to answer "I am not sure" to the PMF question



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G

X-squared = 677.99, df = 12, p-value < 2.2e-16

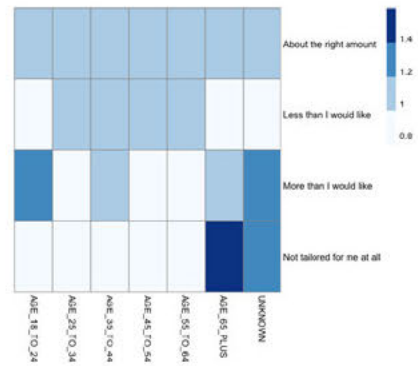
Slide 1

- 7 [REDACTED]@google.com
Please check these three skipped slides for the significant relationships between age and PMF, Freshness, and personalization.
Peiyun [REDACTED]; 2/9/2021 11:18:28 PM
- 16 Thanks Peiyun, I don't see a clear narrative in there for GenZ. Thank you for pulling these data, but I am concerned that you are doing analyses that are taking a lot of time, rather than just a few of the ones we talked about. Please don't treat this as a rush to analyze all your data by age - just highlight any trends that already jump out for GenZ specifically.
Olga [REDACTED]; 2/9/2021 10:46:49 PM
- 8 Good point!
So the narrative is that GenZ did not differ significantly from other age group, except the 65+, on PMF, Personalization, and freshness.
Peiyun [REDACTED]; 2/9/2021 11:11:31 PM
- 17 Right. And is it more that this older (65+) cohort is the special one?
Olga [REDACTED]; 2/9/2021 11:18:28 PM

Personalization is significantly associated with age

For all survey users:

- Users who are 65+ years old were more likely to answer "not tailored to me at all" to the personalization question



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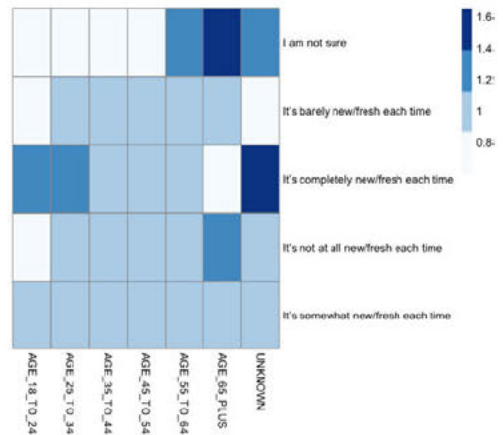
G

X-squared = 677.99, df = 12, p-value < 2.2e-16

Freshness is significantly associated with age

For all survey users:

- Users who are 65+ years old were more likely to answer "I am not sure" to the content freshness question



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G

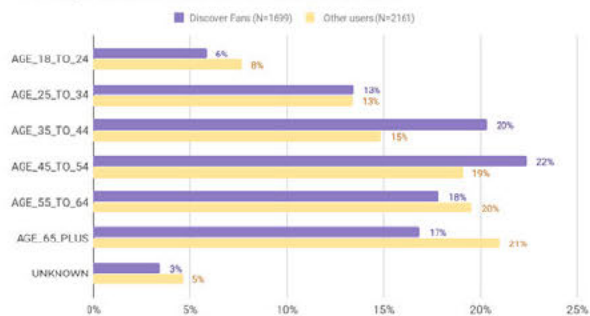
X-squared = 677.99, df = 12, p-value < 2.2e-16

Inferred age : “Discover fans” vs. other users

- More males than females among Discover fans

10

Age distributions for “Discover Fans” vs. other users



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Discover fans: “Very disappointed” + Frequent Discover L28

X-squared = 5.4551, df = 1, p-value = 0.01951

alternative hypothesis: two.sided

95 percent confidence interval:

-0.036599079 -0.003400921

sample estimates:

prop 1 prop 2

0.06 0.08

Slide 1

- 9 [REDACTED]@google.com
Reassigned to [REDACTED]@google.com
Peiyun [REDACTED]; 2/9/2021 11:25:12 PM
- 18 this is ios, right?
is that 6% stat sig smaller than 8%?
Olga [REDACTED]; 2/9/2021 8:36:44 PM
- 10 Yes, this is for iGA and they are significantly different. I added the
stats info in the notes.
Peiyun [REDACTED]; 2/9/2021 11:25:12 PM

Product Market Fit Among Existing Users Android Users

Among our existing Discover users in the iOS Google App, there was no significant difference in the overall attitude and satisfaction with the product between younger (ages 18-24) and the rest of the group.

*Note that the "Product-Market Fit" question and methodology is used here as a proxy for satisfaction.

* Note that due to the limitation of HaTS, the answer items here were limited and different from the standard question framing (and different from our use of the same question in other surveys)

How disappointed would you be if you could no longer use the article feed in your app?

[Link of the raw data](#)

11

Key Significant findings

Interesting

- Format X PMF – low PMF are more likely to select “other” and “more videos” for format
- Adaptivity X PMF – low PMF users were more likely to report Discover did not adapt to their current interests well or report “I am not sure”
- Description x Age : Young adults (18-24 years old) were more likely to describe the Discover feeds as “Articles that inspire me” and “Articles that entertain me”
- Content x Age: Young adult users (18-24 years old) prefer to see more content “related to their hobbies” and “content that entertain them” and other content. Old adult users (65+ years old) prefer to see all of the content.

Interesting

- Discover Enthusiast: Age X Content
 - 18-24 prefer to see more content that related to their hobbies or entertains them. They were highly unlikely to say “current mix of topics is fine” or “all of the above” or “Other”
 - 25-34, they prefer to see more content that related to their hobbies
 - 45-54 year old users were more likely to say they want to see more of all the items above
 - 55-64 were more likely to report other to content preference

Not so useful

- Content X PMF – low PMF are more likely to select other
- No search Discover Only X PMF — Strong positive association between “I don’t know” and “I am not sure”
- No search Discover Only X Age—Users over 65 years old were more likely to answer I am not sure.

Slide 1

- 19 Thank you Peiyun. Don't worry about working on this. Just drop me the raw data on the next pages.
Olga [REDACTED]; 2/9/2021 10:37:04 PM
- 11 <https://docs.google.com/spreadsheets/d/1xUCPnhIVFiaXaniJdo5O0yDOhJLSZ5QxKSOP7b7nEgw/edit?resourcekey=0-GY2CnpBGV-wLE2yhsX311w#gid=1197340401>
I added the data here.
Peiyun [REDACTED]; 2/9/2021 10:37:04 PM

Discover Feed PMF

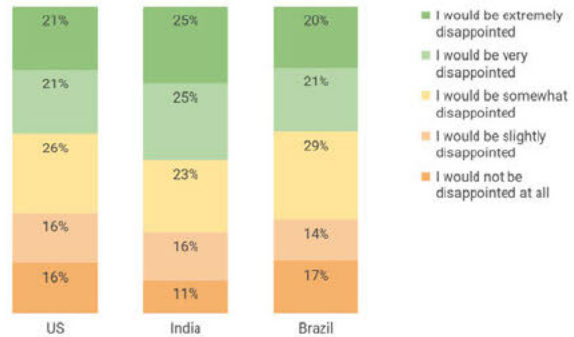
12% of Discover users would be very or extremely disappointed if Discover feed was no longer available.

Market comparisons:

- **India:** significantly more participants would be very or extremely disappointed by Discover feed absence
- **Analysis by age:** 18-24 year olds are least invested in Discover feed; significantly fewer 18-24 year olds in **India** (16%) would be extremely disappointed by Discover feed absence compared to the other age ranges; 18-24 year olds in the **US** (15%) and **Brazil** (17%) trended lowest among the age ranges for being extremely disappointed

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12 Discover Feed PMF



Sample sizes - US: n=3272, India: n=4469, Brazil: n=4162, Overall: n=11903

Q: Imagine if the Discover feed was no longer available in the Google app of your Android smartphone (you can still use Google search in the app). How would that make you feel?

28

Slide 1

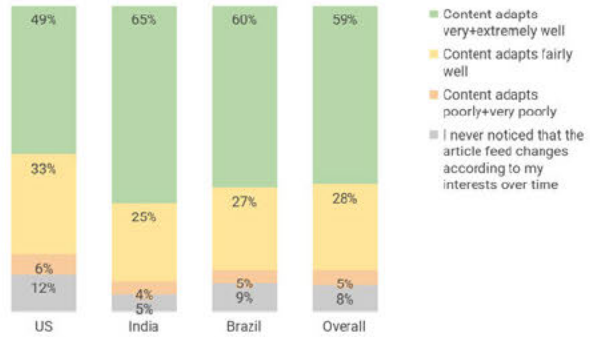
- 12 [REDACTED]@google.com is the 26% in US bar graph significantly higher than the other age groups in the US?
Emilie [REDACTED] 10/8/2021 10:16:29 AM
- 20 [REDACTED]@google.com Would you be able to give me the data to complete a chart like this for each country? <https://docs.google.com/spreadsheets/d/1xUCPnhIVFiaXaniJdo5O0yDOhJLSZ5QxKSOP7b7nEgw/edit?resourcekey=0-GY2CnpBGV-wLE2yhsX311w#gid=594832673>
Olga [REDACTED] 2/9/2021 10:40:30 PM
- 12 Please see the new table added to the link that you shared.
Peiyun [REDACTED] 2/9/2021 10:40:30 PM

Discover Feed Adaptation

Market comparisons:

- **US**: significantly fewer participants considered content to adapt very or extremely well
- **India & Brazil**: the majority of participants considered content to adapt very or extremely well
- **Analysis by age**: significantly more 55-65 year olds in the **US** (28%) and **Brazil** (14%) never noticed the article feed changing according to their interests; significantly fewer 18-24 year olds in **India** (56%) considered content to adapt very or extremely well

Discover Feed Adaptation



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Sample sizes - US: n=3272, India: n=4469, Brazil: n=4162, Overall: n=11903
 Q: How well does your Discover feed adapt to your changing interests over time (e.g., articles are personalized to your new interests, stops showing topics you are no longer interested in)?

29

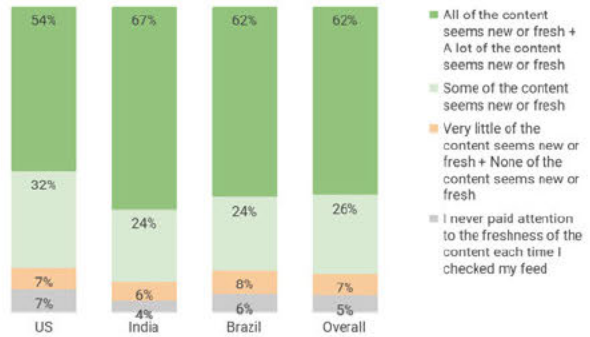
Discover Freshness

Across markets, more than ½ of participants reported a lot or all of the Discover feed content to be new or fresh when checked.

Market comparisons:

- **US:** significantly fewer participants reported that a lot or all of the content appeared to be new or fresh
- **India:** significantly more participants reported that a lot or all of the content appeared to be new or fresh
- **Brazil:** majority of participants reported that a lot or all of the content appeared to be new or fresh
- **Analysis by age:** significantly more 55-65 year olds in the **US** (14%) never paid attention to content freshness; significantly fewer 18-24 year olds in **India** (61%) reported that a lot or all of the content appeared to be new or fresh

Discover Feed Freshness



Section

Current and planned studies

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Gen Z Competitive Analysis Qualitative Deep Dive [Data Collection in Progress]

Study details



This competitive analysis investigating Gen Z's top feed apps, focusing on:

- + Key features
- + Defining interactions
- + Usage statistics
- + User feedback

Methodology



- + Competitive analysis of Gen Z's top feed apps:

- + Instagram
- + Youtube
- + TikTok
- + Snapchat
- + Twitter
- + Reddit

Participants



- + Qualitative user feedback collected from

11

Gen Z Modern Aesthetic Preference [Planning in Progress]

Study details



The goal of this study is to understand what influences and defines Gen Z's visual culture and aesthetics:

- + Preferences for visual aesthetics
- + Definition of "modern"
- + Digital products and apps

Methodology



- + Interviews with "specialists" and influencers
- + Literature review of current landscape
- + Visual "diary study" with participants

See [study brief](#) (work in progress) for more details.

Participants



- + Gen Z market specialists and influencers
- + 30 Gen Z participants across the US

Slide 1

- 21 [REDACTED]@google.com Started this. Let me know if you can add anything - doesn't have to be complete
Olga [REDACTED]; 2/10/2021 5:58:38 AM
- 22 just put these in as placeholders.
Olga [REDACTED]; 2/9/2021 9:53:50 PM
- 13 As of right now, we still don't know if we can use Franklin Till / Canvas 8 for actual user interviews; but if we want to speak to actual participants then I can find another vendor
Emilie [REDACTED]; 2/9/2021 9:54:23 PM
- 23 IMO- both Franklin Till and Canvas 8 are taking too long to figure out. I vote to use a regular vendor to collect the data and then either ask VisD to do the deliverables or hire Franklin Till just for design
Olga [REDACTED]; 2/9/2021 10:18:45 PM
- 14 Sounds like a plan. FYI [REDACTED]@google.com
[REDACTED]@google.com [REDACTED]@google.com
Emilie [REDACTED]; 2/9/2021 10:20:26 PM
- 1 +1 collecting the data is the priority. thank you for all the efforts thus far
Jessica [REDACTED]; 2/10/2021 1:29:27 AM
- 2 hey all -- just peeking at this deck today since i was commented in. You might be interested in this article I came across today:
- Atlantic article on "Aesthetics Wiki", the website that meticulously categorizes teen digital aesthetic subcultures like "romantic academia" and "traumacore." "In adolescence and young adulthood, there's 'a strong drive to articulate one's identity' ... and in the social-media age, a natural and significant way of doing that is through choosing and arranging images," she writes.
- <https://www.theatlantic.com/technology/archive/2021/02/aesthetics-wiki-cottagecore-tumblr-tiktok/617923/>
Debra [REDACTED]; 2/10/2021 5:43:01 AM
- 24 This is amazing. I stumbled on "cottagecore" recently and have been fascinated ever since. I wonder if this indicates that for GenZ (unlike other generations), there is less of a monolithic aesthetic and a greater proliferation of different aesthetics. I also wonder if this will play out throughout different life phases for the generation.
Olga [REDACTED]; 2/10/2021 5:54:48 AM
- 1 +1 to collecting data, etc.
- And also thanks for the 'Cottagecore' reference, these are all the things my 17 and 18 year old are talking about. I really try to get insights from them and they've also mentioned Discord as their social media app of

Slide 1 (continue)

choice.

Super interesting.

Xiomara [REDACTED] 2/10/2021 5:58:38 AM

Qualitative Gen Z UXR [Data Collection in Progress]

Study details



This study explores participants' attitudes and behaviors regarding:

- + content-consumption (social media and news), and how it ties to their digital wellbeing
- + Discover usage, if any

See [research plan](#) for more details.

Methodology



- + Diary study followed by 1:1 interviews with a subset of participants
- + Every day for a period of eight days, participants answer survey questions and submit screen recordings
- + Dates: findings report mid-March

Participants



- + 14 diary participants, ages 15-23 years old
- + iOS only
- + Mix of gender, household income, and ethnicity
- + Mix of Discover users and non-Google app users

Appendix

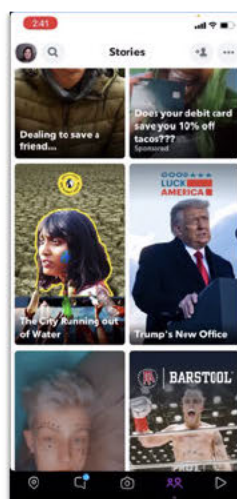
Google | Proprietary & Confidential



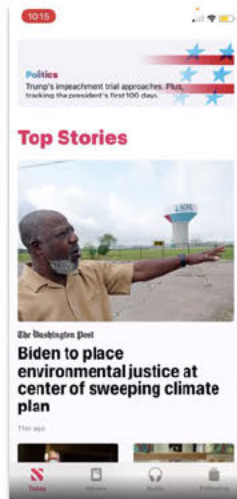
15 Gen Z Discover users see social media apps and news apps as competitors to Discover

Participants perceived social media apps (because they have **personalized feeds**) and/or apps with **news stories** as competitors to Discover.

- "So I would say one of the competitors could be the [Apple] news app...you can scroll through all of the **top stories** and stuff." (P4, 15)
- "Snapchat...You can have subscriptions and then it also has some **news things** but then it also has **celebrity information**. And I think a lot of it pops up kind of **related to what you search** and who you add." (P3, 19)
- "...the biggest competitor to Google in my daily life is Twitter because it has a feed that's more **geared towards me**." (P2, 16)



Snapchat's Discover



Apple News

Google | Proprietary & Confidential

G 36

Question: What other *apps do you see as "competitors" of the Discover feed* on the Google app? (For example, McDonald's and Burger King are competitors.) Feel free to look at the apps on your phone to help you answer this question.

- Participants referred to one or more of the following as competitors:
 - Snapchat's Discover feature
 - Instagram's Explore page
 - Twitter
 - Reddit
 - TikTok
 - Facebook
 - Chrome's Discover feed, Bing and Firefox's feeds
 - Apple News
 - Any news app/website that has content on Discover (i.e. CNBC, BuzzFeed, CNN, cooking websites, etc.)
- "The Instagram Explore page might be the closest to that is the Google homepage. It doesn't have news stories but it's sort of based on what you like..it's customized to you." (P8, 17, F)
- "I think that the biggest competitor to Google in my daily life is Twitter because it has a feed that's more geared towards me." (P2, 16, F)
- "Since the Discover feature on the Google app is very tailored to what I'm wanting to read at that moment that day and what's been going on also in news I'd say that its

closest competitor would have to be Facebook." (P9, 19, F)

- "The Instagram Explore page might be the closest to that is the Google homepage. It doesn't have news stories but it's sort of based on what you like..it's customized to you." (P8, 17)

Slide 1

15

██████████@google.com Here's the slide I made about Discovers
users' perceptions of Discover competitors, feel free to add /edit if
you'd like!

Emilie ██████████ 2/10/2021 2:34:18 AM

For Zs (ages 13-23), “news” means information about government, politics, and the economy

Zs generally get into news in their middle teen years as their friends, family, and teachers introduce them to news stories and issues, many of which may fall into “serious topics” such as government, politics, and the economy.

Q. Which of the following best fits with how you define “news”?
Please select one

	U.S.	India	France	Brazil
#1	Information about government, politics, and the economy US: 37%			
#2	Information that helps me know what's going on in my local community 20%	Information that helps me know what's going on in my local community	Information that helps me know what's going on in my local community	Information that helps me know what's going on in my local community / Information I really need to know (tie)
#3	Information that affects my daily life 15%	Information I really need to know	Information I really need to know	Information that affects my daily life
#4	Information I really need to know 13%	Information about things I'm interested in learning	Information about things I'm interested in learning	Information about things I'm interested in learning

Google | Proprietary & Confidential

Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g9a531c2c8f_2_34

Answer choices that were ranked lowest on the list in the US included:

- information about things I’m interested in learning (6%), information that is relevant to me and my friends (6%), and none of the above (2%).

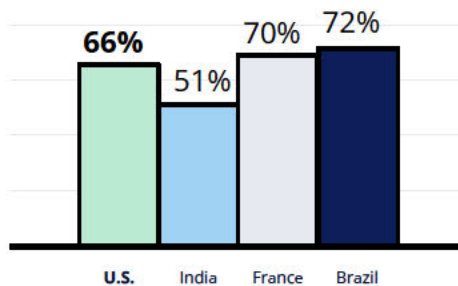
For Zs ages 13-22, consuming news is for being in the know

Staying informed is the top reason Zs in the US, India, France, and Brazil engage with news.

"I like staying informed about current news topics because it allows me to be more intelligent and knowledgeable when I'm having conversations with friends and just the people in my everyday life in general."

– 17 year old participant (US)

Q. For which of the following reasons, if any, do you consume the news?
'Feel informed about what's going on'
Select all that apply



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G

Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g98be87a944_3_38

The remaining answer choices were selected far less frequently (US): to form an opinion (39%), feel more connected to my local community (32%), feel more connected to other cultures/countries (32%), it's a responsibility (29%), have something to talk about (23%), feel smart (21%), to have something to do (20%), feel connected to my peers/friends (18%), take my mind off other issues in my life (13%), because I'm expected to (12%), to relax (10%), take a mental break (8%), feel happier (6%), feel cool (6%), none of the above (6%).

A majority (53%) of Zs ages 13-22 reported using Instagram for news on a daily basis

Q. How often, if at all, do you use each of the following social media platforms for news (e.g., see news, share news, discuss news)?

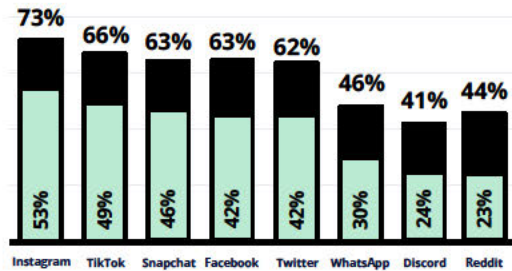
Summary of U.S. Zs

○ At least daily ● At least weekly

A little under half (49%) use TikTok Instagram, TikTok, and Snapchat for news.

"There are 3 main applications that I use for news ... Instagram, Twitter, and YouTube. I use these applications because there are many people I follow who have good input about topics that I'm interested in."

– 17 year old, U.S.



Taken directly from

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g539259aa1f_20_132

As a first step, performing an online search is the most common (44%) way for Zs to learn more about a news story

In the US, fewer than 10% of Zs reported doing the following as a first step when wanting to learn more about a news story:

- Going to a news website (8%), asking a family member (6%), go to a news app (6%), ask a friend (5%), turn on the radio (2%), listen to a podcast (2%), something else (3%)

Q. When you learn about a news story and you want to know more about it, which of the following would you do first?
Please select one.

	U.S.	India	France	Brazil
#1	Do a search online 44%	Do a search online	Do a search online	Do a search online
#2	Check social media 15%	Turn on TV news	Turn on TV news	Go to a news website
#3	Turn on TV news 11%	Go to a news website	Check social media	TIE: Check social media & Turn on TV news

Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g9a531c2c8f_0_52

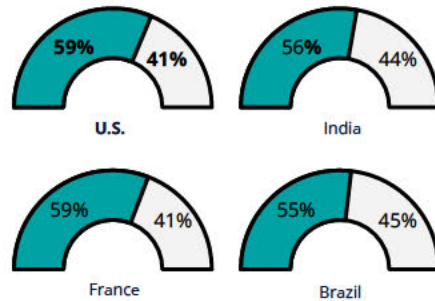
Zs reported wanting a higher proportion of hard news (59%) in their news diet

Zs feel that that hard news is necessary to stay informed on key events, while soft news is nice to have to balance their "news diet."

In this study, the US and France were significantly more likely than Brazil and India prefer to receive hard news than soft news.

Q. For the two options listed below, please tell us what percentage you would prefer to do/receive for each?

Please note your total must add to 100%



- Hard news (e.g., serious news coverage, breaking news)
- Soft news (e.g., news coverage that is followed for fun or about lighter topics)

Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g539259aa1f_13_19

**As they try to stay informed,
50% of Zs reported feeling
overwhelmed by how much
news there is to consume**

*"If I have to go a week without consuming news, a part of me would feel stressed about missing out on what's happening and current events....However, a part of me would feel less stressed by **not feeling burdened by all the negative things happening in the world.**"*

– 18 year old, U.S.

*"...Sometimes news makes me tired, I'm tired of the **constant awful news**, like there's no good in the world."*

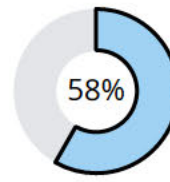
– 19 year old, U.S.

Q. How strongly do you agree or disagree with each of the following statements? 'I feel overwhelmed by the amount of news'

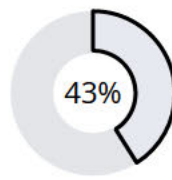
Strongly/Somewhat Agree Summary



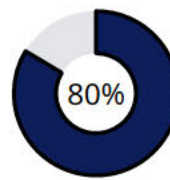
U.S.



India



France



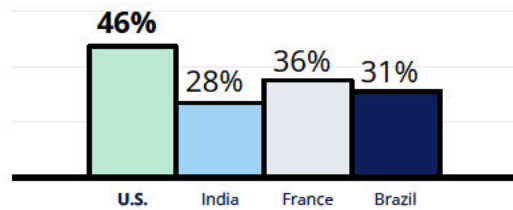
Brazil

Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g9a0caf7472_0_292

Keeping up with the news takes a toll, with some nearly half (46%) of Zs needing to take breaks from the news

Q. Which of the following, if any, are true for you?
'Sometimes I need to take a break from the news'



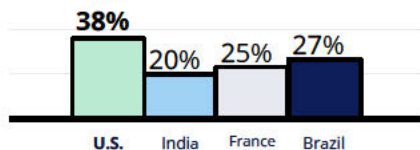
Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g9a0caf7472_0_292

Nearly two in five (38%) Zs find that most major news is depressing

This proportion is lower in the three other countries from this study (India, France, and Brazil.)

Q. Which of the following, if any, are true for you?
'I think most major news is depressing'
Select all that apply

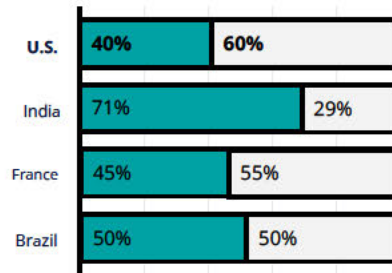


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A majority (60%) reported that the news makes their mood worse

Q. Please select one statement from each pair below that you agree with more?

- ☒ The news generally makes my mood better ☐ The news generally makes my mood worse



G 44

Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g9a0caf7472_0_292

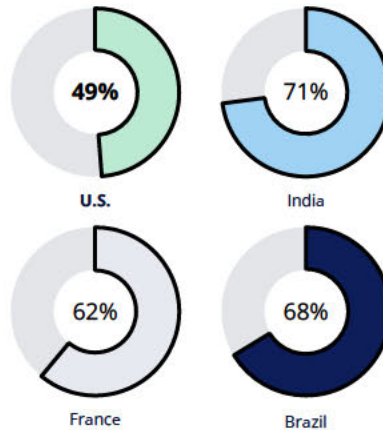
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Zs were split when asked if they preferred “news that is positive”

This proportion is much lower compared to the three other countries from this study: India, France, and Brazil, where most Zs reported preferring positive news.

Q. How strongly do you agree or disagree with each of the following statements?
‘I prefer news that is positive’

Strongly/Somewhat Agree Summary



Taken directly from:

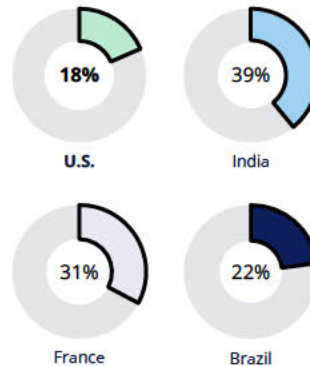
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Few Zs (18%) reported that they would prefer *not* to see serious news

In qualitative research, Zs acknowledged that serious news tends to not be positive, but they feel they need to consume it because it is important to stay informed.

Zs in the U.S. are the least likely to say they'd rather avoid serious news compared to the other countries in this study (India, France, and Brazil.).

Q. How strongly do you agree or disagree with each of the following statements?
'I would rather not see serious news'
Strongly/Somewhat Agree Summary



Taken directly from:

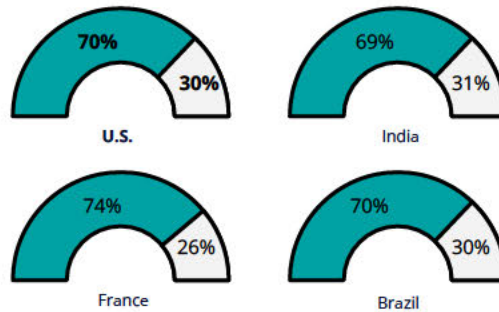
https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFEk1LcB8bLgvFQsgaVxC2kfZI8/edit#slide=id.g9a0caf7472_0_512

Most Zs (70%) reported preferring visual news formats over text-based formats

This finding is in line with [findings from earlier in this deck](#) that 13-18 year olds prefer images and memes as content formats significantly more than older Gen Zs and millennials.

Q. Please select one statement from each pair below that you agree with more.

☒ I prefer visual news formats ☐ I prefer text news formats



Taken directly from:

https://docs.google.com/presentation/d/1NnyNEAyjyPOmhumQNFek1LcB8bLgvFQsgaVxC2kfZl8/edit#slide=id.g9a531c2c8f_2_1355

When consuming news, Zs use/are interested features like save for later, share, and viewing others' comments

Zs engage with their friends around the news, and the features that are of the greatest interest to them—the ability to share news, see others' comments would help them do so.

Blocking sources (57%) and blocking keywords/topics (52%) was lowest on the list of features respondents currently use / are interested in using.

Q. Which of the following features, if any, do you currently use or are interested in using when it comes to the news you consume?

Ability to save for later	84%
Ability to share	82%
See others' comments	81%
Like/upvote	76%
Ability to comment	74%
Filter topics	70%
Ability to highlight	69%
Ability to make notes	69%
Filter sources	66%
Dislike/downvote	65%
Block sources	57%
Block keywords/topics	52%

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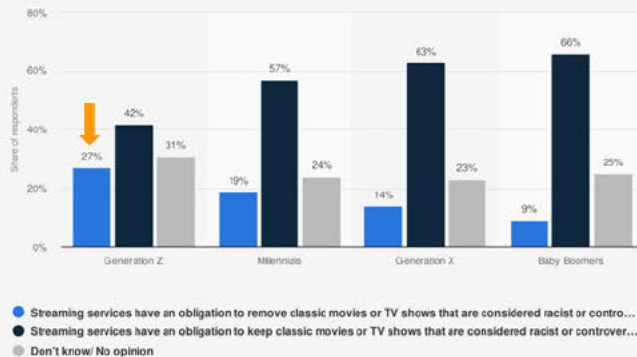
G 48

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Gen Zs are most in favor of removing racist/controversial content from streaming sites compared to other generations

Opinions on streaming service's obligations to keep or remove classic movies and TV shows with controversial content in the United States as of June 2020, by generation



Sources
Morning Consult, The Hollywood Reporter
© Statista 2020

Additional information:
United States; Morning Consult; The Hollywood Reporter, June 11 to 13, 2020; 2,200 respondents; 18 years and older; Or

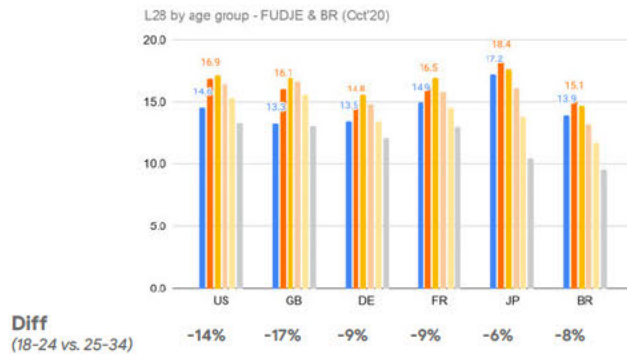
G 49

Younger generations are most in favor of removing content from streaming sites considered to be racist or controversial, a survey in June 2020 found. There is a clear divergence in opinions across age groups, with 66 percent of Boomer's preferring to keep classical films or TV shows due to historical context, whilst only 42 percent of Generation Z felt the same.

Link: <https://www.statista.com/statistics/1129180/streaming-controversial-movies-tv-shows-usa-generations/>

16 However, Youth are less engaged compared to older age groups, driven by a smaller breadth of info needs

Youth are less engaged in FUDJE & BR vs. next age group (25-



Slide 1

16

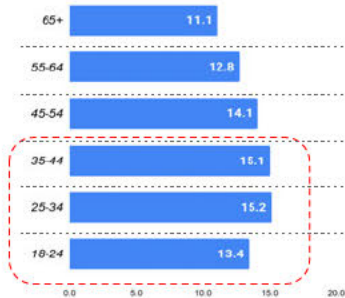
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Search https://docs.google.com/presentation/d/1RvXRGIpTs1qqeMvMe1MR03OwHx_mJai6iH1_-IJ-h9k/edit?ts=60219212#slide=id.gb20dfa01f6_0_350 I pasted a couple
slides if they're of interest
Emilie ██████████ 2/9/2021 10:53:24 PM

Youth Search vertical breadth is lower than the next age group, consistent with a smaller variety of info needs in daily life (DIN data)

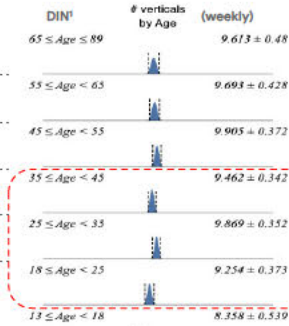
US data

Youth has lower search vertical breadth vs. older age groups...

Search vertical breadth (Monthly)



...consistent with variety of overall daily info needs



Google

¹usDIN, 2018-2020. N = 1445

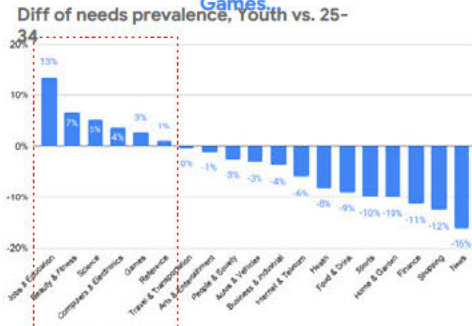
Confidential + Proprietary

51

Youth are more likely to report needs in Entertainment, Education, Video Games, and Beauty & Fitness categories

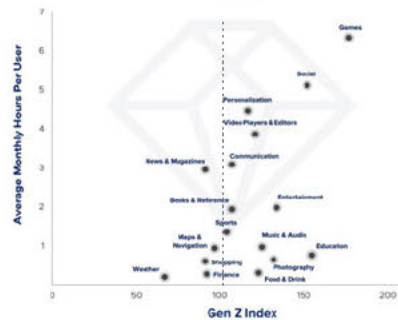
US data

DIN data shows that Youth more likely to report needs in Education, Beauty & Fitness, Games...



...Largely consistent with App Annie report, except for Entertainment (Higher among Youth)

Gen Z Engagement by Category
H1 2019



Among verticals over-indexed with Youth, Youth now have lower engagement vs. 25-34 with Entertainment and Games

